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AMERICAN MUSIC CONFERENCE

MUSIC USA

1980 Review of the Music Industry and Amateur Music Participation

Letter From The Chairman

The American Music Conference is moving into its 34th year with the best directed program and the strongest staff in its history.

This exceptional period of development, paced by strong board involvement, as well as staff guidance and initiative has resulted in the high visibility necessary for the Conference to effect change.

As our name suggests, we "conferred" this past year at the highest levels: within our own industry at the Third Economic Council of the Music Industry, with ranking members of the Congress and the federal government who have an impact on music funding and music education, and with leaders of the arts and music education community.

AMC's president and other staff members have traveled throughout the country lending their expertise, and their encouragement to music education and arts organizations. Our newly remarked presence in Washington, and our recognition of both governmental bodies and private organizations that are stimulating music involvement are all facets of a new and dynamic program.

Highlights of the past year are reviewed in these two pages, but this entire annual review is itself an example of AMC member services and cooperative activity. Without the assistance of all the music industry's members and its individual organizations, this annual MUSIC USA review would not be possible.

More powerful, more visible, AMC is continuing to work for the industry, the performer, the educator, and millions of amateur music makers all over the world.

Robert G. Campbell
Chairman

AMC at Work

AMC Helps Save Musical Instrument Funding

In June, 1979, members of AMC's board of directors and staff combined forces with other industry representatives and music educators to amend Title IV-B, which would have made school band instruments ineligible for federal funding.

Testifying at one of several regional hearings on the matter conducted by the Office of Education, AMC president Gene Wenner stated: "It is inconceivable to me that a band instrument can be used *other* than to teach or learn music."

In addition to extensive testimony, AMC stimulated a number of letters to Congressmen and to the Office of Education, seeking revision of the proposed regulation. As a result of this effort, Title IV-B regulations have been published that say: "A very large number of commenters objected to the exclusion of these items (band instruments) because of the educational and social values of music . . . in instructional programs. The definition of 'instructional equipment' has been changed to allow the acquisition of 'musical instruments' . . . if used for instructional purposes in music . . . classes in the school's regular instructional program."

AMC Honors New York State Assembly
On March 3, 1980, AMC president Gene Wenner (left) presented awards to Stanley Fink, speaker of the New York State Assembly, and Warren Anderson, president pro tem of the State Senate, to recognize their support of school music programming. The legislature had provided $70,000 to bring 450 of the state's outstanding high school musicians to Albany for a "Concert on the Plaza." The funding proposal was initiated by Sen. Anderson, who was impressed by the quality of New York's school music programs, and wanted other state officials to hear the high performance level of the students.

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ECMI
Nicholas Peck, NAMM president and AMC vice president, was chairman of AMC's third Economic Council of the Music Industry. EMCI meets annually to discuss major concerns of the industry. The 1979 session focused on financial planning, marketing and the future direction of music. Guest speakers included Irving Schweiger, professor of marketing, University of Chicago; William E. Whitney, Jr., senior vice president, Oglivy & Mather, and Ezra Laderman, director of music programs for the National Endowment for the Arts.

Public Service Announcements
AMC president Gene Wenner (left) thanks jazz musician Billy Taylor for his contribution to AMC's 1980 public service announcement series. Announcements urging support of school music programs recorded by Taylor, Dinah Shore, Johnny Mathis, and Peter Schickele were sent to more than 7,000 radio stations coast-to-coast. In addition, a video spot featuring Ms. Shore was sent to 200 major market television stations. A second series of spots promoting adult participation in music will be released in the fall of 1980.

Millions of Americans Get the Message

Each year, AMC reaches millions of Americans with the message that making their own music can be a rewarding lifetime experience. Through newspaper and magazine features, television and radio shows and public service announcements, the association promotes amateur participation in music and support of school music programs.

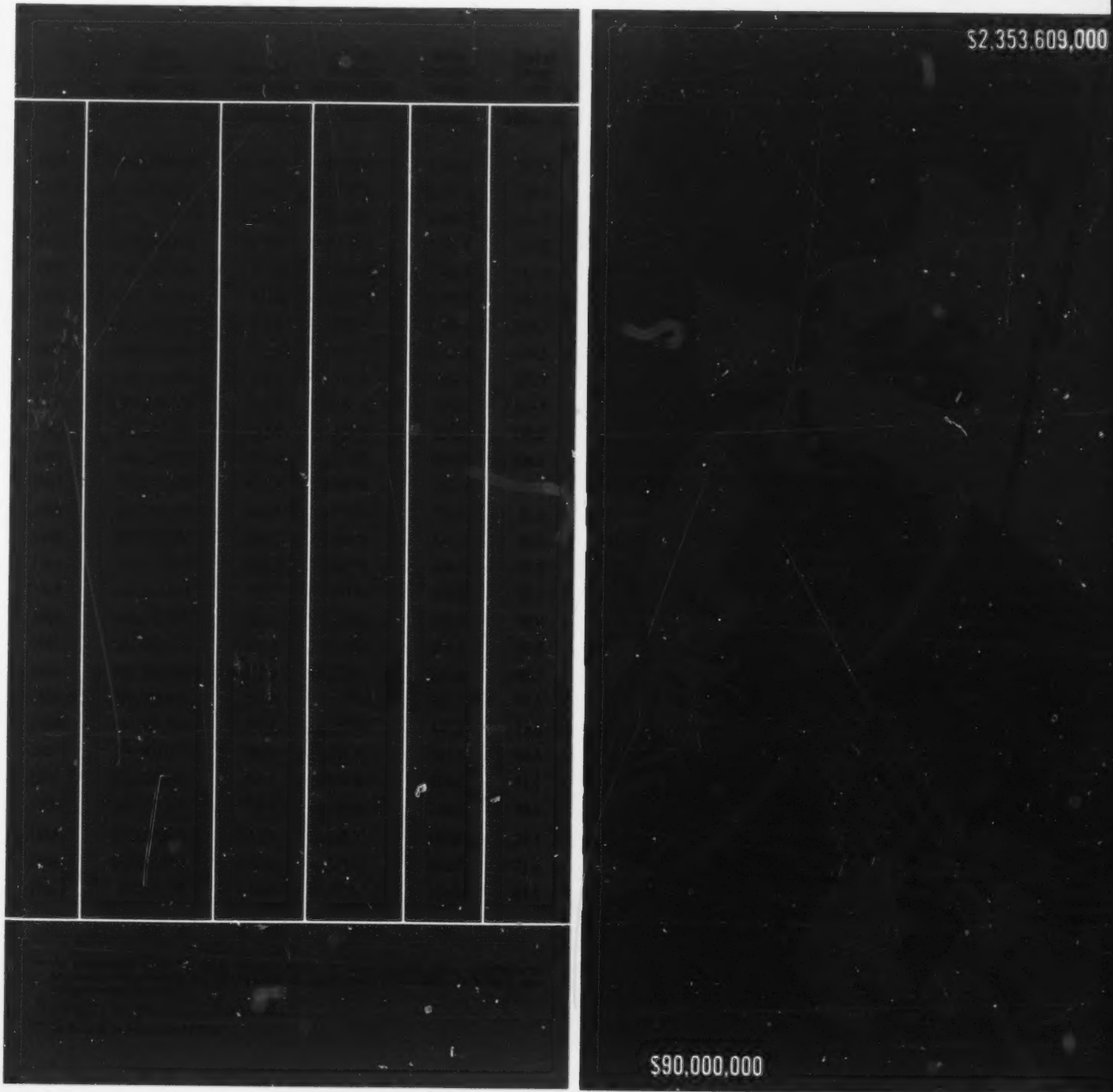
A key part of this promotional effort is a number of AMC-sponsored awards programs:

- Advertising Awards which recognize the best use of musical instruments in advertising for nonmusical products. Revlon took top honors in the print category in the 27th awards competition for "Le Mood Jazz." First place in TV commercials went to AT&T.
- Family of the Year honoring one musical family to represent the nation's 50 million amateur musicians. AMC's 1980 recipients were the Sherry Mayo family of West Palm Beach, Florida. In addition, 5 regional winners were named for the first time this year.
- The Original Songwriting Contest with Scholastic Magazines, Inc., open to all junior and senior high school students. The winner of this year's $100 first prize is Debbi Smith (17), a senior at Cumberland Regional High School, Seabrook, New Jersey. (See photo, page 5.)
- A National Newspaper Association competition to select the best story on community music activities. Winners for 1979 were Fred Crafts and Charlie Nye, of the Eugene (Oregon) Register-Guard, for a story on a local musician.
- The Music Educator of the Year Award, to be given for the first time in 1980, will honor an outstanding teacher engaged in either public or private instruction from kindergarten through college.

AMC Reaches Out to Music Educators

AMC had high visibility at the 1980 Music Educators National Conference, held April 9-12 in Miami Beach. AMC-sponsored sessions included a panel discussion on careers in music, a presentation on how to promote school keyboard programs, and a session on how to start a school guitar program, co-sponsored with GAMA.

Retail Sales of New Musical Instruments, Sheet Music, and Instrument Accessories, 1941-1979



Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

Music Industry Sales at $2.3 Billion in 1979

Music industry sales are estimated to have climbed to $2,353,609,000 in 1979, a modest gain of 2.34% over 1978. The statistics reviewed in these pages reflect estimated retail sales of instruments, accessories, printed music, and sound reinforcement equipment sold through music stores.

Dollar increases in instrument price tags lagged well behind the cost of living rise of 11%, making music a continuing sound investment. Only electronic organs had a dollar decline; all other categories were up in dollars, with pianos leading the increases at almost 10%.

Tight money and high interest rates had a significant impact on big ticket items in the music field, and were responsible for maintenance of low retail inventories. However, demand for music continues to be strong, and the amateur movement among all ages is expected to grow in dimension in the year and the decade ahead.

About These Statistics

Only three categories in this review are based on an organized (but voluntary) reporting system and even within these categories (pianos, organs, guitars) estimates have been made for manufacturers who do not report their sales.

In the printed music category, figures are based on best estimates by the National Music Publishers Association.

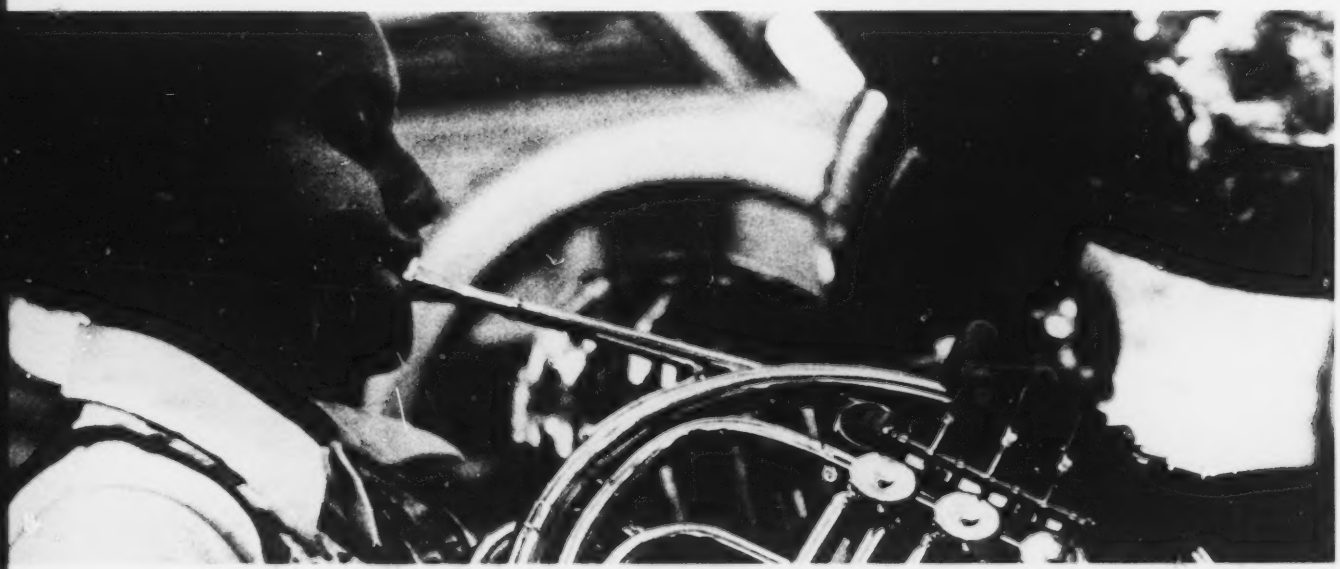
In all other categories, retail sales are based on estimates calculated by combining an average retail value for American made instruments (or accessories) with an average retail dollar value of imports. In categories where there is no reporting system available, a representative number of manufacturers or publishers are interviewed to arrive at a consensus on the size of the total market.

The figures are based on the assumption that what is manufactured during the year is also sold in that year. It should be noted also that this review omits a number of manufacturing areas for which it would be extremely difficult to compile data: music kits, harp production, a variety of instruments used in elementary education, musical toys, estimates for craft production (other than bowed strings) or any used instruments.

Imports in 1979 accounted for about a fourth of all estimated sales, and had a retail value of between $500 and $550 million. Imports are figured into all relevant categories. Exports, which grew substantially in 1979, are included where indicated.

With the changing nature of imports (some foreign manufacturers are shipping parts from abroad and assembling in the United States, some are building manufacturing facilities here), and the tremendous increase in exports, determining the exact amount that is made and sold domestically is becoming more complex each year.

For all these reasons, it should be noted that while the figures are as accurate as a three-month study can make them each year, they are not difinitive, and are intended as a broad gauge aid in following market trends.



Sales of Pianos		
	Units	Dollars*
1979	[illegible]	[illegible]
1978	206,172	[illegible]
1977	263,516	[illegible]
1976	[illegible]	[illegible]
1975	[illegible]	[illegible]
1974	[illegible]	[illegible]
1973	[illegible]	[illegible]
1972	[illegible]	[illegible]
1971	[illegible]	[illegible]
1970	[illegible]	[illegible]
1965	[illegible]	[illegible]
1960	[illegible]	[illegible]
1950	172,531	125,000
1940	136,332	95,000

*In thousands of dollars.
Source: National Piano Manufacturers Association and industry estimates.

Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Units sold by manufacturers in 1979 were down slightly (2%) but dollar volume rose 10%.

The small drop in units shipped during 1979 occurred during the last quarter of the year when a plate shortage curtailed shipments, and retailers maintained smaller inventories.

Sales of Organs		
	Units	Dollars*
1979	[illegible]	[illegible]
1978	[illegible]	[illegible]
1977	[illegible]	[illegible]
1976	[illegible]	[illegible]
1975	[illegible]	[illegible]
1974	[illegible]	[illegible]
1973	[illegible]	[illegible]
1972	[illegible]	[illegible]
1971	[illegible]	[illegible]
1970	[illegible]	[illegible]
1965	[illegible]	[illegible]
1960	[illegible]	[illegible]
1950	10,000	14,000
1940	NA	NA

*In thousands of dollars.
Source: National Association of Electronic Organ Manufacturers ,U.S. Tariff Commission and industry estimates.

Organs

Includes: Domestic production and imports with a retail value of over $400. Exports are not included in this table.

Less expensive units from both U.S. makers and abroad were the best sellers in 1979, marking a shift in the recent trend toward higher priced organs. Dollars dipped 17%; units were down 12%. With the ability of manufacturers to provide more features at the same cost, through the use of microprocessors, consumers are getting a more sophisticated, more versatile product than was previously available in the lower price range.

Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

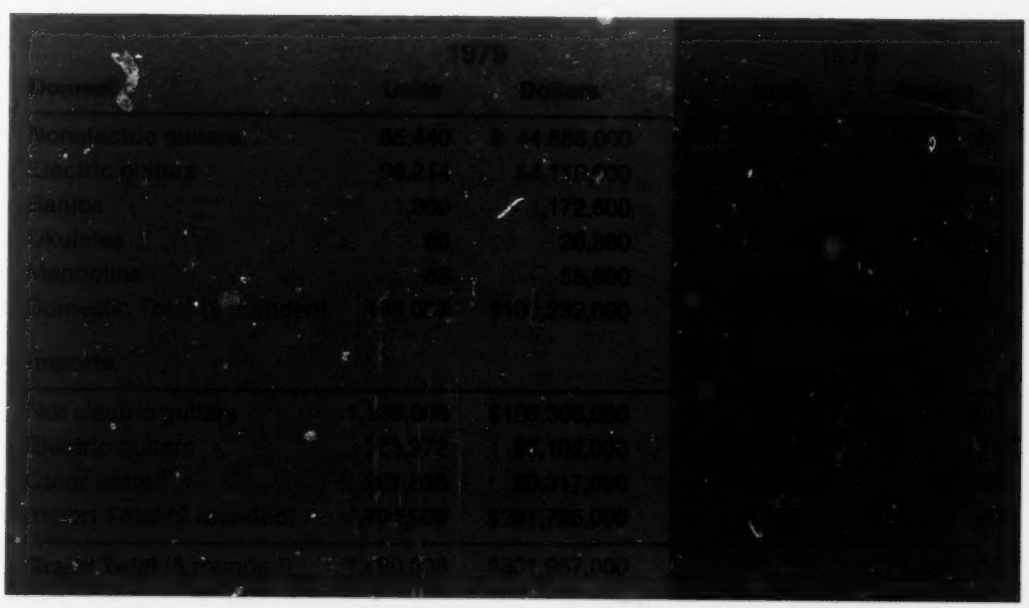
The average value of American-made fretted instruments is higher than imports. Low numbers in such categories as banjos, ukuleles and mandolins do not take into account craftsmen who may be involved in substantially larger production of less expensive units. American-made electric guitars were up an estimated 10% while dollars for the domestic market segment as a whole were up 13%.

Sales of Fretted Instruments

	Units	Dollars*
1979	1,898,086	$301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1971	2,[illegible]8,639	155,147
1970**	2,214,686	159,910
1965**	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

*In thousands of dollars.
Source: Guitar and Accessory Manufacturers Association, U.S. Tariff Commission and industry estimates.
**These years also include estimates of amplifier and P.A. system sales.

Sales of Fretted Instruments



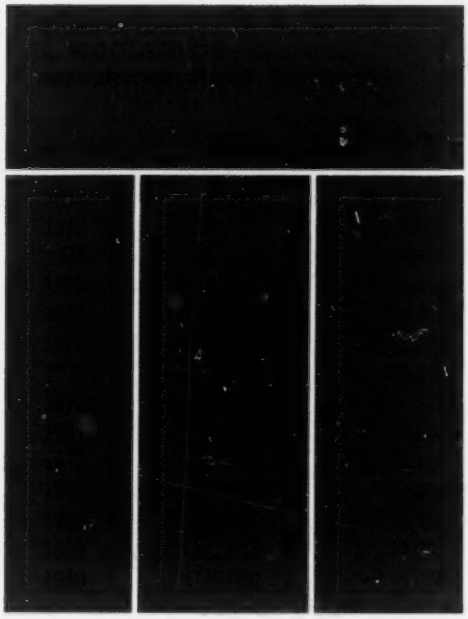
Domestic	1979 Units	1979 Dollars
Nonelectric guitars	85,440	$ 44,856,000
Electric guitars	98,214	$ 51,572,000
Banjos	1,200	$ 1,172,600
Ukuleles	60	$ 38,880
Mandolins	40	$ 66,600
Domestic Total (5 Products)	184,954	$101,232,000
Imports		
Nonelectric guitars	1,239,918	$150,305,000
Electric guitars	453,972	$ 47,102,000
Other fretted	19,242	$ 3,317,000
Import Total (3 Products)	1,713,132	$200,725,000
Total Sold (8 Products)	1,898,086	$301,957,000

Wind Instruments

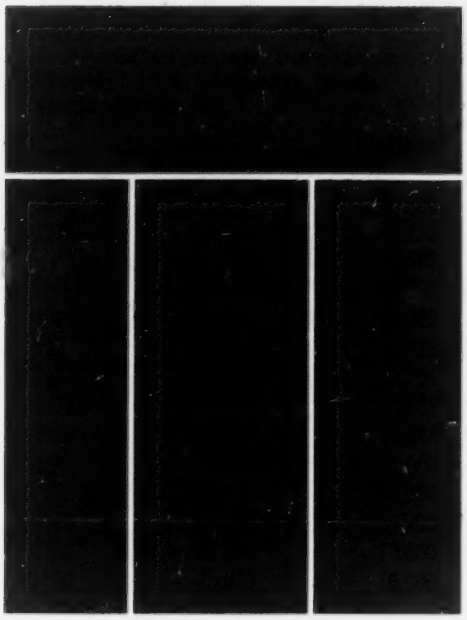
Includes: Domestic production as well as imports.
Exports are not included.

A dramatic drop in imports of both brass and woodwind instruments was responsible for the decrease in units. The small increase in dollar sales reflects a substantial shift in the mix of imported and domestically made instruments. Sales of American manufacturers were slightly ahead. A strong demand for saxophones continued throughout the year.

Woodwind Instruments



Brass Instruments



**In thousands of dollars.*
Source: Industry estimates.

Sales of Strings

	Units	Dollars*
1979	92,000	38,500
1978	83,500	36,500
1977	75,000	26,200
1976	83,000	25,400
1975	91,225	28,000
1974	68,685	19,486
1973	64,666	15,252
1972	61,565	12,559
1971	51,136	12,385
1970	75,[illegible]	19,720
1965	64,000	13,400
1960	40,000	7,300
1950	NA	NA
1940	NA	NA

String Instruments

Includes: Imports and domestic production of violins, violas, cellos and basses.

Continuing demand for string instruments — especially violins — is responsible for the 10% increase in units. Dollars have been adjusted in the 1979 estimate to reflect the projection that a majority of units sold are violins (including cases and bows) that sell in the $350 range. Imports from West Germany, which make up more than half of the units in this category, rose 19% in value last year.

*In thousands of dollars.

Source: U.S. Tariff Commission with adjustment made for domestic production.

Sales of Amplifiers**

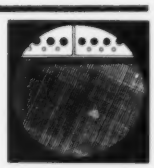
	Units	Dollars*
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,930	53,592
1972	110,000	43,245
1971	96,000	35,643

Sales of P.A. Systems and Components**

(mixers, mixers, power amplifiers, speaker systems and components, single processors)

	Units	Dollars*
1979	NA	211,000
1978	NA	188,000
1977	NA	100,000
1976	NA	80,000
1975	71,000	63,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971	16,000	9,903

Sound Reinforcement Equipment



Includes: Domestic production and imports sold through music stores. Exports are not included.

Smaller sized guitar amplifiers led the market in 1979; units are estimated to have remained flat while dollars were up about 10%.

There were no major technological advances in sound systems during the year; emphasis was on portable and high quality, highly sophisticated equipment. The 12% increase in dollar sales is largely reflective of price increases in a mature market.

*In thousands of dollars.

**Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

	Units	Dollars*
1979	[illegible]	[illegible]
1978	24,000	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973**	7,000	8,900

*In thousands of dollars.
**First year for inclusion of this category.
Source: Industry estimates.

Sales of Synthesizers

Synthesizers

Includes: Domestic production and imports. No export breakout is available.

Total units and dollars for synthesizers stayed about even with 1978 but both high priced and low priced units showed gains. Synthesizers range in price from under $400 to over $4,000. The most advanced synthesizers are polyphonic and programmable, a feature which gives this instrument more versatility and makes it far easier to play. The memory banks in the programmable synthesizers not only simulate instrumental voices, but offer sound effects ranging from thunderstorms to outer space.

	Units	Dollars*
1979	[illegible]	[illegible]
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972**	15,000	9,000

*In thousands of dollars.
**First year for inclusion of this category.
Source: Industry estimates.

Sales of Electric Pianos

Electric Pianos

Includes: Domestic production, imports and exports. Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

For the first time statistics on the exact number of electric piano imports were available, accounting for the significant dollar and unit increase. Imports account for a little over 50% of this category. The U.S. market for electric pianos remained strong and exports surged ahead during the year.

	Units	Dollars*
1979	NA	[illegible]
1978	NA	61,240
1977	NA	56,700
1976	NA	53,001
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,858
1971	NA	34,880
1970	NA	32,000
1965	NA	30,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

*In thousands of dollars. Source: Industry estimates.
Unit figures unavailable since drums sold in sets.

Sales of Drums

Drums

Includes: Domestic production of drums and percussion accessories and exports. Imports are not included.

Sales of drums are estimated to have moved ahead 15% in 1979, a figure which represents a 10% increase in prices and a real gain of 5%. Exports of drums were especially strong. The market has been sustained by demand for a wide variety of percussive instruments for marching bands.

	Dollars*
1979	$261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1971	120,133
1970	91,500
1967	72,000

Sales of Printed Music

**In thousands of dollars.*
Source: Estimates from the National Music Publishers Association. 1971-1973 NMPA figures were based on comprehensive survey data.

Printed Music

Includes: Domestic publishing of sheet music and self-instruction aids.

Sales of printed music at retail are estimated to have been about 8% ahead of the previous year. Part of the increase was attributed to higher sales of gospel and sacred choral music.

The school market for printed music remained stable despite declining populations and school closings; self-instruction aids sold especially well for piano and guitar self-learners.

	Dollars*
1979	$247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1971	120,866
1970	108,400
1967	85,000

Sales of Accessories

**In thousands of dollars.*
Source: Industry estimates.

Accessories

Includes: Estimates for retail sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Accessory sales continued at an even pace during the year; the higher value is due to price increases. Strings, cases and electronic accessories have the highest volume in this category.

	Dollars*
1979	$330,000
1978**	151,000
1977**	91,000
1976	89,256
1975	120,487
1974	106,628
1973	107,072
1972	92,146
1971	79,304
1970	76,509
1967	53,900

Sales of Miscellaneous Other Instruments

**In thousands of dollars.*
Source: U.S. Tariff Commission.
***Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.*

Miscellaneous Other Instruments

Includes: Imports of accordions, autoharps, bagpipes, bongos, chimes, concertinas, cymbals, drums, educational instruments, harmonicas, harps, harpsichords, marimbas, melodicas, organs valued at under $400, recorders, xylophones.

The value of imports covering a broad range of instruments was about even with last year, even though the dollars reported show a decrease. Electronic pianos, previously included in this category are now listed separately; their retail value is about $13,000,000.

Accordions and concertinas are now included with this category; their retail value is estimated at about $5.6 million in 1979.

Retail Sales Show Composite Three Percent Growth for the Year

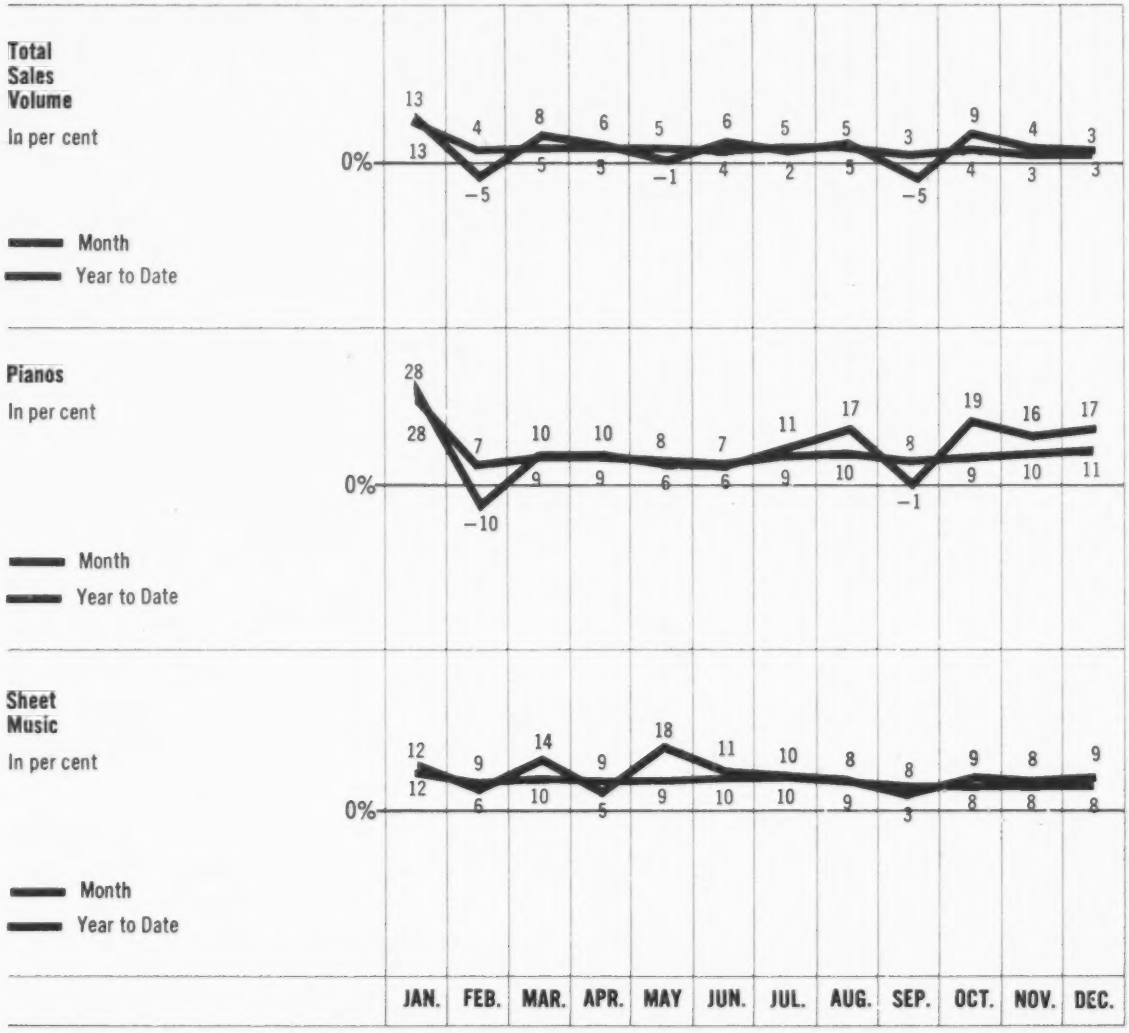
Sales of musical instruments, pro sound/audio equipment, sheet music, home entertainment equipment, and accessories in music stores were tabulated for the first time in 1979.

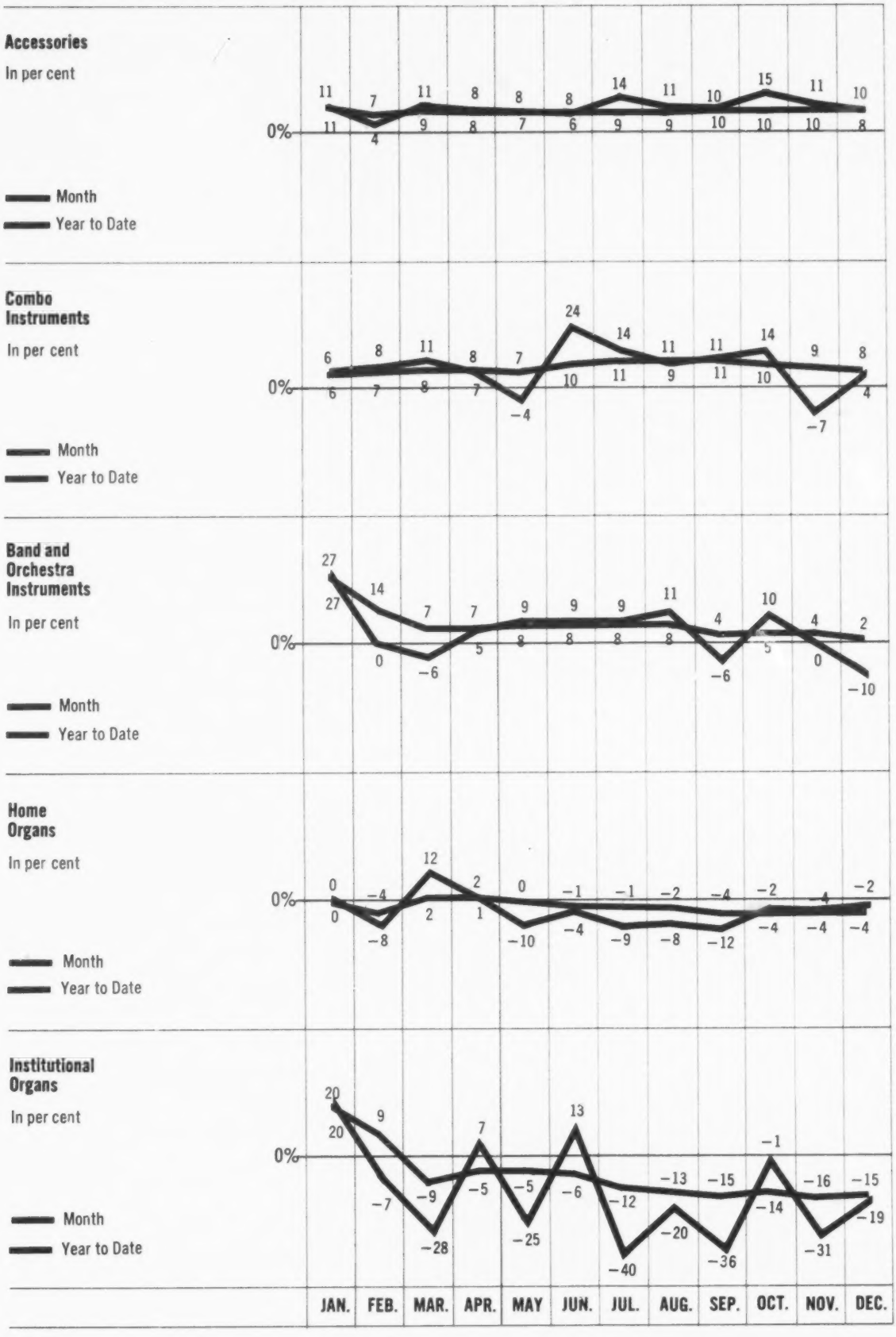
An analysis of the charts prepared by Ernst & Whinney for the National Association of Music Merchants indicates that retail sales of pianos and accessories showed the biggest gains, with combo instruments and sheet music following closely. Pianos were up 11% for the year; accessories had steady growth of about 10% throughout the year; combo instruments and sheet music both had gains of about 8% by the end of 1979.

Except for March, 1979, when reporting retailers showed gains over previous year sales, home organ sales were consistently below the 1978 levels and ended the year off about 4%. Institutional organs were down about 15% for 1979.

Looking at total sales, volume in February and September slipped notably below 1978 levels for the reporting retailers. On the other end of the scale, October, 1979, volume was reported considerably higher than the prior year, both in total and in many individual categories.

On each of the following graphs, the base line (0%) represents 1978 sales. Heavy lines within each graph indicate monthly changes and "year to date" status. Totals for the industry include sales of home entertainment equipment not shown by separate chart.




Accessories
In per cent
0%
11 7 11 8 8 8 14 11 10 15 11 10
11 4 9 8 7 6 9 9 10 10 10 8
Month
Year to Date
Combo Instruments
In per cent
0%
6 8 11 8 7 24 14 11 11 14 9 8
6 7 8 7 −4 10 11 9 11 10 −7 4
Month
Year to Date
Band and Orchestra Instruments
In per cent
0%
27 14 7 7 9 9 9 11 4 10 4 2
27 0 −6 5 8 8 8 8 −6 5 0 −10
Month
Year to Date
Home Organs
In per cent
0%
0 −4 12 2 0 −1 −1 −2 −4 −2 −4 −2
0 −8 2 1 −10 −4 −9 −8 −12 −4 −4 −4
Month
Year to Date
Institutional Organs
In per cent
0%
20 9 −9 7 −5 13 −12 −13 −15 −1 −16 −15
20 −7 −28 −5 −25 −6 −40 −20 −36 −14 −31 −19
Month
Year to Date
JAN. FEB. MAR. APR. MAY JUN. JUL. AUG. SEP. OCT. NOV. DEC.

Amateur Music Makers Growing; School Music Programs Stabilizing

More than 50 million Americans say they can play a musical instrument and this number is growing about 6% a year. About three-fourths of those who can play, do so regularly (at least 6 times a year).

A survey undertaken for the AMC by The Gallup Organization[1] found that 51% of the households responding included at least one amateur music maker. In 48% of these households, at least one instrument is owned with guitar, piano and organ the most likely to have been purchased.

In nearly half of the musical households, amateurs own two instruments; nearly a fourth own three or more.

American amateur musicians tend to be young, come from families with above average incomes and have a college or at least a high school education; woman make up 57% of all amateur musicians.

Nearly two-thirds of amateurs come from families with incomes over $20,000; 43% live in suburban areas; 96% have a high school diploma, and about half are college educated.

According to the survey, three-fourths of all active amateurs are under 35; better than one-third of all amateurs are pianists followed closely (30%) by guitarists.

Organ, clarinet, drums, flute, trumpet, violin and harmonica complete the "top ten" popular instrument category. Among players of these instruments, men are most likely to select guitar, drums, trumpet, harmonica and saxophone.

On the School Scene

Both amateur musicians and nonplayers are in general agreement that school music and other fine arts programs are important to a child's development.

In the Gallup survey on music participation, 88% of those queried believed music instruction should be part of a child's education; better than half (58%) felt music participation should be available to all children, and some 60% said music instruction should be part of the school curriculum.

A telephone survey of 25 state supervisors of music, in the spring of 1980, found that school music programs were stabilizing. Nearly half of those queried said music programs were at the same level as last year; one-fourth said schools in their states added new programs; the remainder noted cutbacks in some school programs.

In states where schools faced cutbacks in programs, hardest hit districts were in urban areas in industrial states where a combination of economic woes and population shifts reduced funds available for education.

Nearly half of the music supervisors queried said that student music populations in their schools had stabilized; slightly over one-fourth of the respondents said music enrollment increased or decreased.

One-third of the supervisors indicated a decrease in general music education positions and the loss of music specialists, balanced by a third who said they had more music teachers

[1]*The 1978 Gallup survey was funded for AMC by a special grant from the National Association of Music Merchants.*

Characteristics of Amateur Households*

Annual Income	All Respondents	All Owners of Instrument	Piano Owners	Guitar Owners	Organ Owners
$20,000 and over	23%	38%	45%	38%	32%
$15,000–$19,999	14%	15%	13%	17%	10%
$10,000–$14,999	16%	14%	13%	17%	11%
under $9,999	26%	21%	15%	20%	26%
Undesignated	16%	14%	18%	10%	20%
Median U.S. income:	$13,750				

*Based on a 1978 Gallup survey of 1,521 adults over 18 years of age.

What The Amateurs Are Playing

INSTRUMENT	1978-1979¹ Number of Amateurs²	% Male	% Female	Median Age	1969-1970³ Number of Amateurs	% Male	% Female	Median Age
Flute	3,160,000	21%	79%	28	1,400,000	23%	77%	27
Guitar⁴	15,144,000	65%	35%	23	7,000,000	70%	30%	21
Organ	6,196,000	29%	71%	34	4,700,000	32%	68%	37
Clarinet⁵	2,344,000	31%	69%	15	2,030,000	45%	55%	16
Drum⁵	2,249,000	94%	6%	19	1,900,000	83%	17%	17
Flute⁵	2,648,000	17%	83%	19	630,000	38%	62%	14
Trumpet	2,279,000	86%	14%	19	2,200,000	88%	12%	15
Violin	1,799,000	32%	68%	27	1,250,000	45%	55%	19
Harmonica⁴	1,548,000	86%	14%	25	750,000	90%	10%	44
Saxophone	1,549,000	82%	18%	22	not included this year			
Accordion	not included this year				1,400,000	44%	56%	28

1. Figures represent national projections based on the results of a 1978 survey of 1,521 U.S. households by The Gallup Organization. The 16 and up list was used as the category of Americans (between the ages of 5 and 15) who say they play these instruments — and not an indication of everybody between the ages of 5 and 15. 1969-1970 figures are projections from a survey of 1,520 families by The National Opinion Research Center.
2. Each of an amateur musician's plays more than one instrument.
3. Includes acoustic and electric guitars.
4. The number of people who consider themselves experts on harmonica. Since several million harmonicas are sold annually, the number of players is probably much higher.
5. Median age for active players in these three categories is: clarinet—14; drums—16, and flute—16.

than three years ago — several in states which reported decreasing enrollments.

Most popular instrumental programs in the schools, other than band and orchestra, are guitar and piano which are offered in schools in nearly half of the states surveyed; about a third of the states have Suzuki and Orff programs in their schools.

About half of the states offer integrated arts programs. Oklahoma has 28 demonstration schools involved in integrated arts, up from fewer than a dozen two years ago. In Missouri, a growing number of schools are offering programs geared to a broad theme which incorporates all the academic and fine arts disciplines.

A number of respondents said that individual teachers are experimenting with electronic labs; ethnic and local folk music; rock, including small ensembles, musical dramas and composition. Many of these programs, however, are available only at the secondary level.

Music programs appear to be strongest in the southern states which reported more programs, higher student enrollment and larger music faculties; severest cutbacks seem to have hit the midwestern states along with New York and California, where financial woes are affecting all community services.

The majority of states, however, are maintaining their budgets, programs and staff at levels comparable to three years ago.

Musical Instrument Exports Up 16 Percent in Dollars; Imports Fall in 1979

The dollar value of exports of musical instruments surpassed the value of imports for the first time in 1979. Exports totaled more than $195 million while imports fell to $190 million according to an analysis of U.S. Department of Commerce, Bureau of the Census data.

Exports of electric guitars rose 25% in units and had a value of almost $12 million. American-made electric guitars were shipped to some 60 countries in 1979 including the USSR, but the largest quantity were received by the United Kingdom and Japan.

Brasswind instruments shipped abroad were up 32% in units, and about the same in dollars since the average unit price rose only marginally. The total of the brasswinds category was about $9.5 million.

Exports of percussion instruments were ahead 53%; synthesizers and electric pianos were up 24% over 1978 bringing the total value to over $20 million.

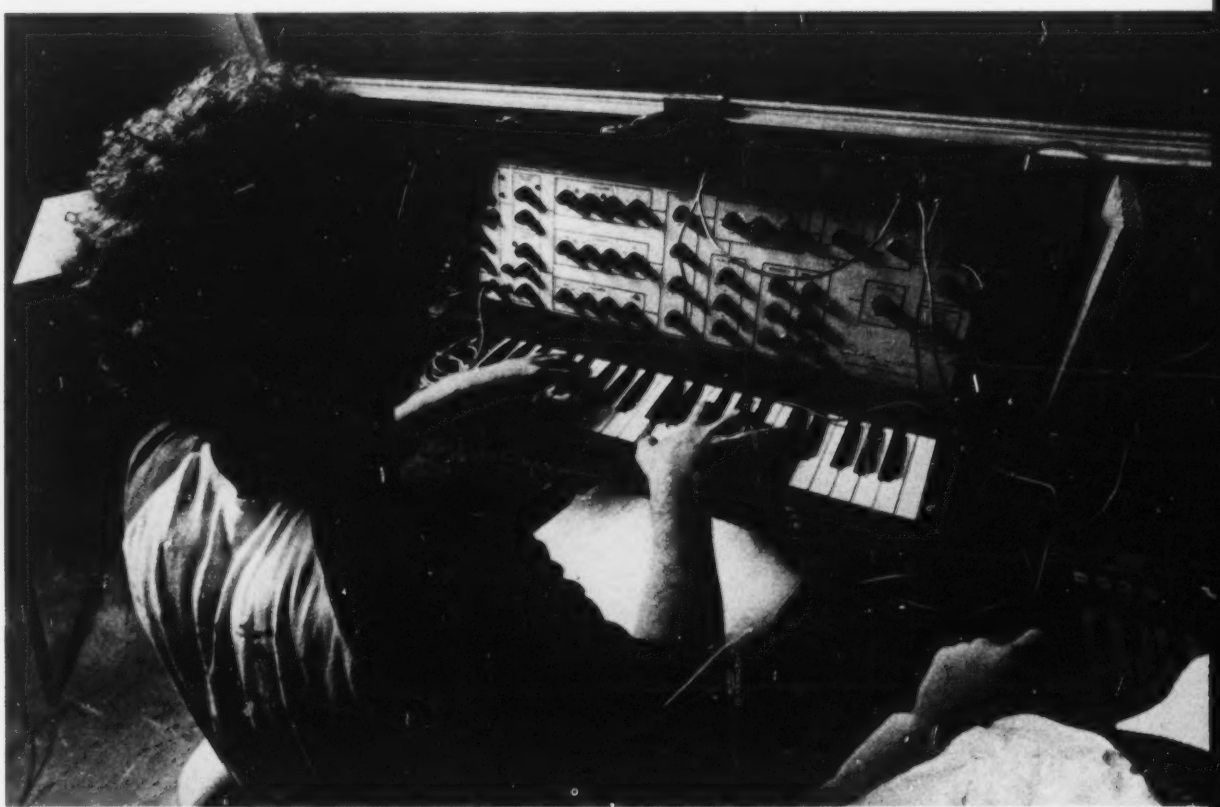
There was a small increase in pianos exported last year, but the value of the category rose to nearly $18 million due to price increases. The value of the average piano exported was up from $734 in 1978 to $865 in 1979.

The number of acoustic guitars exported dropped 19% but the dollar value rose substantially since the typical guitar exported in 1979 cost $166 compared with $104 the previous year.

Also registering declines in exports were all types of organs, other plucked and bowed instruments (excluding guitars) which fell 42% in units against 1978, and woodwinds, which dropped in number of units, but rose in value. Electronic organs are still the largest export category in dollars: more than 53,000 organs were exported in 1979 for a value of nearly $55 million. Dollars were only slightly lower than 1978, but units were down 13%. Australia and The Netherlands joined Canada as the major purchasers of electronic organs in 1979.

Imports Drop 5 Percent

After steady increases in imports during the 1970s, the total value of musical instruments and parts purchased by American buyers fell 5% in 1979. Significant declines in units were



registered by all types of organs, accordions and concertinas, mouth organs, brasswind instruments, clarinets and saxophones.

Imported electric guitars were up 13% in units but the dollar value rose only 9% reflecting larger shipments of less expensive units from Korea, and a decline in units from Japan.

Imports of violins, violas and other bowed strings continued on an upward swing in 1979; units rose 9% and dollars were up 17%.

In response to a request by the American Music Conference, for the first time the Department of Commerce has broken out the units and dollars involved in imports of electric pianos and synthesizers. Almost 13,000 electric pianos were imported in 1979 with a value of almost $5 million. About two-thirds of all the units came from Italy. Six thousand synthesizers were imported with a value of just over $2 million; the principal supplier was Japan.

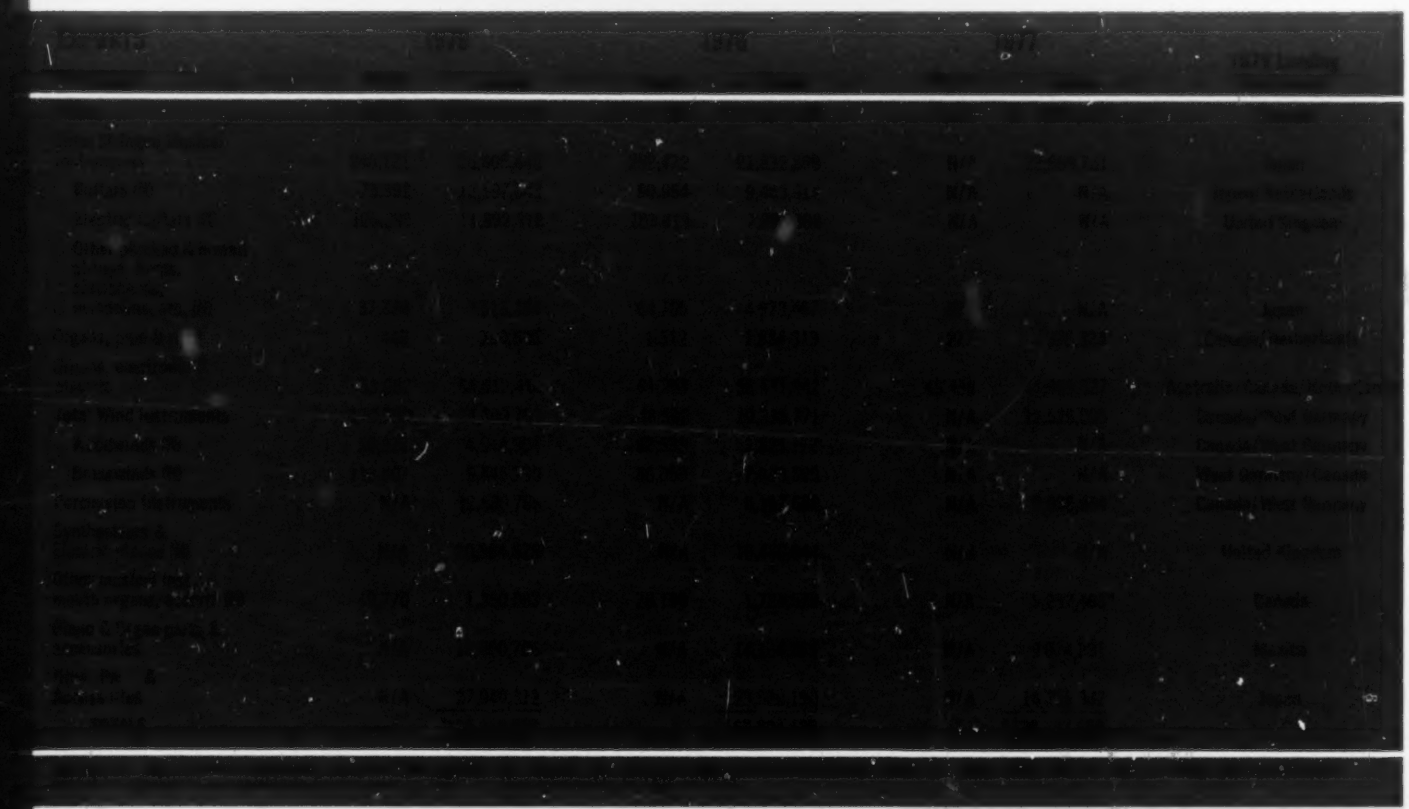
Brasswinds had a 34% decline while clarinets were down 39%, and 13% fewer saxophones were imported.

The average piano imported in 1979 was valued at $1,284 an increase of 15% over 1978, but units were down marginally to just over 27,000. Unamplified guitars, always the largest category in units, dropped slightly. More than one million guitars imported from Korea and Taiwan during 1979 were all valued at about $19. The average value of a Korean made guitar rose over 40% while the value of a guitar made in Taiwan dropped about $3. The result was that the average value of the one million guitars imported from Korea and Taiwan in 1979 was about the same: $19.

Units and dollars in the electronic organ category were sharply down in 1979 due to a decrease in imports from Italy, and shipments of much lower priced units from Japan. The landed value of an average imported organ (with a U.S. retail value of more than $1,000)) was $593 as compared to nearly $1,000 in 1978.

The value of Japanese imports ranged from more than $700 to less than $50; almost 6,000 units were imported with a value of less than $50 from Japan. In all, the electronic organ category was down 54% in dollars, from $18 million in 1978 to $8 million in 1979.

Accordions and concertinas are at their lowest import level since AMC has been compiling import-export data: they dropped 41% in units for a total of 10,215 with a value of $1.7 million.



U.S. Imports of Musical Instruments, Parts and Accessories

Imports	1978		1977		1978 Principal Source
	Quantity	Value	Quantity	Value	
Pianos, Upright	8,000	4,000,000	78,000	4,140,000	West Germany
Pianos, Grand	1,000,000	10,000,000	1,000,000	10,000,000	Japan
Pianos, Other	200,000	4,000,000	190,000	4,000,000	Japan
Organs, Reed	N/A	1,500,000	N/A	1,600,000	West Germany
Organs, Electronic	4	2,000,000	4	2,000,000	Japan
Guitars, Acoustic, Flat Top and Classical	12,000	1,000,000	10,000	1,000,000	Japan
Guitars, Acoustic, Other	10,000	1,000,000	10,000	1,000,000	Japan
Guitars, Electric	60,000	2,000,000	60,000	2,000,000	Japan
Banjos, Mandolins, Ukuleles	14,000	1,000,000	10,000	1,000,000	Japan
Violins	10,000	1,000,000	10,000	1,000,000	Japan
Accordions	10,000	1,000,000	10,000	1,000,000	Japan
Other Stringed Instruments, Nec	500,000	3,000,000	500,000	3,000,000	Japan
Percussion Musical Instruments, Nec	N/A	12,000,000	N/A	12,000,000	Taiwan
Reed Instruments, Nec	20,000	8,000,000	20,000	8,000,000	Japan
Brass Instruments	250,000	12,000,000	250,000	11,000,000	Korea/Japan
Flutes and Piccolos	N/A	4,000,000	N/A	4,000,000	Japan
Parts and Materials, Nec	N/A	40,000,000	N/A	40,000,000	Mexico
Electronic Musical Instruments	10,000	6,000,000	N/A	7,000,000	Japan
Other Musical Instruments, Nec	N/A	1,000,000	N/A	1,000,000	Japan
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